



# Company Console User Guide

*2007*

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# Introduction

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## *Overview*

Effective July 1, 2007, individuals who desire to become registered as Principal Managers or Loan Originators must pass an examination prior to a certificate of registration being issued. The Company Console User Guide provides instructions for purchasing one or more Principal Manager or Loan Originator examinations.

Companies interested in purchasing a Principal Manager or Loan Originator exam for an employee should read this Guide in its entirety. This Guide contains important information regarding obtaining Purchase Codes to use when purchasing Principal Manager and Loan Originator examinations and tracking sponsored candidates.

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# Registration

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## *Account Setup*

Use the following URL to register for an account and purchase exams:

**<https://secure.vitapowered.com/isos/userlogin.screen>**

Create an account by clicking the [User Registration](#) link in the top right corner. Complete the registration form including your Company name and any other pertinent information in the Comments box and click the "Continue" button. Required fields are noted with a red asterisk.

Once your registration request has been approved, you will receive an email confirmation.



**Be sure to remember your login ID, password and security answer! You will need this information when logging in to the Company Console website.**

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## *Login*

To login to the Company Console website, enter your login ID and password. If you have forgotten your password, follow the instructions below.

### **Forget Your Password?**

To retrieve a forgotten password, click the [Forget Your Password?](#) link on the Login screen.

1. Enter the Login ID and Security Answer you created during account registration.
2. Click the "Submit" button. A new password will be sent to the e-mail address you provided during registration.

To retrieve a forgotten Login ID or Security Answer, please contact Technical Support at **[ISOS\\_Support@panpowered.com](mailto:ISOS_Support@panpowered.com)**.

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## *Updating Information*

From the Console screen, you can also change your password and edit your user profile.

### **Change Your Password**

If you would like to change your password, click the [Profile](#) link in the upper right corner of the Console screen. You will be taken to the Profile screen where you can view your profile details. To change your password, click the [Change My Password](#) link.

If you are changing your password, please remember it is case sensitive and must include at least six characters. Those characters may be uppercase letters, lowercase letters, numbers and/or symbols (! @ # \$ ^ &).

### **Edit Profile Details**

To edit your profile details provided during the registration process, click the [Edit](#) link. Make the appropriate changes to your details and click the "Submit" button to return to the Profile screen.

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# Purchase New Exams

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## *Overview*

After you log in, you will be directed to the Console screen. From the Console screen you can purchase new exams, search for your purchase codes, change your password and edit your profile details.

## *Selecting Assessments*

To purchase new exams, click the [Purchase New Exams](#) link. Enter the number of Loan Originator and/or Principal Manager exams you would like to purchase in the corresponding box in the Number of Purchases column. The total cost of the exams will calculate automatically in the Exam Total Purchased Amount column.



**Purchase codes are exam specific; they are not transferable to other exam types.**

## *Paying for the Assessment*

Only Visa, MasterCard, and American Express are accepted. The credit card expiration date and security code are required to complete your payment.

1. Enter your credit card information in the required fields.
2. Click the "Continue" button.
3. Verify the billing and payment information you entered is correct and click the "Pay for Assessment" button.

The charge will show on your statement from "PERFORMANCE ASMNT NT CARMEL IN" and NOT the Indiana Secretary of State.



**Before you pay for the exam(s) selected, you MUST verify you have selected the appropriate exam(s). There are **NO REFUNDS OR CHANGES** allowed once you have paid for an exam(s). The exam period will expire twelve (12) months after purchase date.**

## *Paying for the Assessment*

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### **Payment Receipt**

After clicking the “Pay for Assessment” button, you will be provided a receipt of the transaction. Use the [Print Receipt](#) link provided to print a copy of the receipt for your records. Click the “Continue” button.

It is very important you print a payment receipt for your records.

After completing the registration process and purchasing exams, you will be directed back to the Console screen. The Console screen now indicates the number of Loan Originator and Principal Manager exams purchased in the Available for Use column.

### **Exam Expiration**

All exams must be taken **WITHIN** twelve (12) months of the purchase date. **NO REFUNDS** will be given. When assigning purchase code information, be sure to inform the candidate of the time restriction.

### **Refunds**

There are **NO REFUNDS**. Do not pay until you are sure you have the right exam(s) and your employee will be able to complete the exam before the twelve (12) month expiration period.

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# Purchase Codes

## Overview

Purchase codes are linked to the login ID used at the time of purchase. Individuals will not have access to any purchase codes bought by any other individual. A purchase code is not transferable to another candidate once it has been used by the candidate to purchase an exam.

## Explanation

The Console screen provides information about the number of purchase codes that are available, pending scheduling, scheduled, about to expire, and completed for each exam. For example, the screen shot below indicates ten (10) Loan Originator and ten (10) Principal Manager exams have been purchased and available to use.

Exam	Available to Use	Pending Scheduling	Scheduled	Expire Less than 1 month	Completed
Loan Originator Assessment	10	1	1	0	0
Principal Manager Assessment	10	0	1	1	1

### Column Name

### Explanation

Available to Use	These purchase codes have been purchased but have not yet been utilized by a candidate.
Pending Scheduling	These purchase codes have been used by a candidate, but the candidate has not yet scheduled an appointment to take the assessment.
Scheduled	These purchase codes have been used by a candidate, and the candidate has made an appointment to take the assessment.
Expire Less than 1 Month	These purchase codes will expire sometime within the next thirty (30) days. (These purchase codes could also be categorized under any of the three (3) previous categories.)
Completed	These purchase codes have been utilized by a candidate, and the candidate has completed the assessment. The system will not indicate whether the candidate passed or failed the exam.



*Explanation*

(cont.)

Click the hyperlink below the column header for more detailed information. The screen shot below is an example of the detailed information provided.

Purchased Exams							
<a href="#">Console</a> > Available To Use Purchase Codes 1 - 10 of 10 Available To Use Purchase Codes							
Purchased Exams							
Utilized By	Exam	Utilized Date	Scheduled Date	Exam Status	Purchase Code	Purchase Status	Expiration Date
	Loan Originator Assessment				263123098	Available	9/18/2008
	Loan Originator Assessment				509656243	Available	9/18/2008
	Loan Originator Assessment				551731058	Available	9/18/2008

Column Name	Explanation
Utilized By	The name of the candidate who utilized the purchase code.
Exam	The exam to which the purchase code is linked. (Purchase codes must be utilized for the exam to which it is linked.)
Utilized Date	The date the candidate utilized the purchase code.
Scheduled Date	The date in the candidate is scheduled to take the assessment.
Exam Status	The current status of the assessment. (See the Filtering Purchase Codes section for the definition of each status.)
Purchase Code	This is the purchase code number.
Purchase Code Status	The current status of the purchase code.
Expiration Date	The purchase code will expire unless a candidate utilizes it and takes the assessment before this date.



The scheduled date is the date the candidate has selected to take the exam. This is **NOT** the day the candidate made the appointment. Please be sure to inform each candidate of the purchase code expiration date. All exams must be taken **WITHIN** twelve (12) months of the purchase date.

Purchase codes with an Available status can be assigned to another candidate. Remember, purchase codes showing any status other than Available are not transferable to another candidate once used to purchase an exam.

# Filter Purchase Codes

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## *Purchase Codes*

To search for purchase codes, click the [Filter Purchase Codes](#) link. Enter the appropriate criteria in the corresponding field and click the “Submit” button. Click the “View All Purchase Codes” button to see a list of all purchase codes for which you have paid.

The purchase code status may be set to utilized, available or expired. Available exam statuses include:

- Complete – candidates that have completed the exam
  - Pending – candidates currently checked in at the test center taking the exam
  - Withdrawn – candidates who chose to withdraw from the process without taking the exam
  - No Show – candidates who did not show up for his/her appointment to take the exam
  - Incomplete Not Excused – candidates who did not complete the exam for personal reasons while at the test center
  - Pending Check-In – candidates who have a scheduled appointment to take the exam, but have not yet been checked-in at the testing center by a proctor
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# Appendix A

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## *Frequently Asked Questions*

### **Can I schedule a candidate to take a Principal Manager or Loan Originator examination?**

No. The candidate must schedule an appointment using his/her login ID and password. Instructions can be found in the Candidate Guide located on the Indiana Secretary of State, Securities Division website.

### **Will I know if the candidate passed or failed the examination?**

No. The system will not indicate whether the candidate passed or failed the exam.

### **Can I transfer a purchase code?**

No. Purchase codes are not transferable to another candidate once it has been used by a candidate to purchase an exam.

### **What do exam status values mean?**

See the Filter Purchase Codes section of this Guide.

### **What form of payment do you accept?**

The only forms of payment accepted are Visa, MasterCard and American Express.

### **If there is someone else in my company that has purchased assessments, can I view those purchase codes?**

No. Purchase codes are linked to the login ID used to purchase them.

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